



DIGITAL PUBLISHING IN THE AAUP COMMUNITY

SURVEY REPORT: WINTER 2009-2010

INTRODUCTION

In October–November 2009, AAUP surveyed its member presses about digital publishing strategies and programs. The survey had two purposes. This report shares the responses to seven questions specifically about digital strategies, technologies, and concerns related to their book-publishing programs. The survey also collected new and updated information on specific e-publishing programs at member presses in order to update the association’s online directory of such projects. That directory can be found here: <http://aaupnet.org/resources/electronic.html>

SURVEY PARTICIPANTS

59 publishers (45% of then-current membership) completed the survey, representing presses of all sizes, from all regions.

Of the individuals who responded, 39% are press directors, and 24% reported job titles directly relating to digital publishing, including positions in production, marketing, IT, and administrative departments.

NOTES ON PRESS SIZE

Correlating the responding presses with other information* AAUP collects, we can estimate that approximately 49% of participating presses have annual sales of up to \$2 million; 36% have sales of \$2-6 million; 7% \$6-15 million; and 8% more than \$15 million.

* AAUP *Operating Statistics and dues schedules*

SURVEY QUESTIONS

1. Our press is pursuing the following general digital publishing strategies:

Respondents could choose all applicable strategies. Strategies are listed in order of greatest adoption.

<u>STRATEGY</u>	<u># OF PRESSES</u>	<u>%</u>
Backlist SRDP/POD* Programs	54	(91.5%)
E-books through Aggregators	52	(88.1%)
Front-list SRDP/POD Programs	41	(69.5%)
E-book Individual Sales	39	(66.1%)
Full-text Search and Discover	30	(50.8%)
Online Full-text Open Access	25	(42.4%)
E-book Collections	20	(33.9%)

Other (please specify)— Additional responses here included:

- Companion sites for books, such as a database, wiki, or blog
- Separate e-reference publications
- E-book rental
- Print/e-book bundling
- Full-text through Google Books
- Cambridge Books Online (own platform for direct sale)
- 2 presses reported just beginning to develop an e-book program

* Short-Run Digital Printing/Print-On-Demand

2. Our press participates in the following digital discovery programs:

Respondents could choose all applicable programs. Choices are listed in order of greatest participation.

<u>PROGRAM</u>	<u># OF PRESSES</u>	<u>%</u>
Google Books for Publishers	54	(91.5%)
Amazon's Search Inside the Book	45	(76.3%)
Barnes & Noble See Inside	23	(39%)
Summon Unified Discovery	6	(10.2%)
None (listed above or Other)	4	(6.8%)

Other (please specify)— Additional responses here included:

- Chapters/Indigo See Inside the Book
- HathiTrust Digital Library
- OAPEN Library and Europeana (2010)
- Microsoft Live Search Books program
- Dial-a-Book's front matter and first chapter service

3. Our press makes content available in the following formats:

Respondents could choose all applicable formats. Formats are listed in order of greatest adoption.

2 presses skipped this question.

FORMAT	# OF PRESSES	%
PDF	55	(96.5%)
AZW (Kindle)	18	(31.6%)
EPUB	17	(29.8%)
MOBI	8	(14%)
iPhone Apps	2	(3.5%)
LIT	2	(3.5%)
DAISY	1	(1.8%)
None	1	(1.8%)

Other (please specify)—Additional responses here included:

- HTML (1 press)
- XML (3)
- EPUB available soon (6)
- iPhone Apps available soon (2)
- Other file formats for readers with print disabilities (1)
- Kindle titles available soon (2)

4. We provide digital access to content through the following vendors or aggregators:

Respondents could select all applicable choices. Choices are listed in order of greatest participation.

3 presses skipped this question.

VENDOR/AGGREGATOR	# OF PRESSES	%
NetLibrary	47	(83.9%)
ebrary	47	(83.9%)
Questia	35	(62.5%)
ACLS Humanities E-Book	23	(41.1%)
IngramDigital	20	(35.7%)
Bibliovault/Adobe Digital Editions	17	(30.4%)
Tizra	4	(7.1%)
Impelsys/iPublishCentral	4	(7.1%)

Other (please specify)—Additional responses here included:

- Dawson UK (3 presses)
- Scribd (2)
- Canadian Electronic Library (2)
- iGroup (3)
- eBooks.com (5)
- OverDrive (2)
- Sony (1)
- Follett Digital/CafeScribe (3)
- MyiLibrary (4)
- Knovel (1)
- Books 24x7 (2)

- Safari (1)
- EBSCO (2)
- EBL (2)
- Bookshare.org (1)
- Connexions (1)
- Responses also indicated interest in or preliminary discussions with many of the listed vendors plus B&N (Nook), Proquest, Cengage-Gale, Bookserver, Rotunda, Cyberlibris, and CourseSmart

MORE VENDORS AND THIRD-PARTY E-BOOK CHANNELS

In an ongoing discussion via the LinkedIn social network interest group “University Press E-Book Publishers,” AAUP members have mentioned a number of additional e-book and digital content vendors that are on the university press radar. These include Kobo (originally Shortcovers), qoop.com, CredoReference, ScrollMotion/Iceberg ereader (for iPhone), Coolerbooks, Alexander Street Press, Zinio, R2 Digital Library, and University Readers.

5. We offer the following types of free content/access via our own web site:

Respondents could select all applicable choices. Choices are listed as presented.

2 presses skipped this question.

<u>FREE CONTENT</u>	<u># OF PRESSES</u>	<u>%</u>
PDF (full text)	12	(21.1%)
PDF (excerpts)	30	(52.6%)
Readable/searchable online text (full text)	8	(14%)
Readable/searchable online text (excerpts)	17	(29.8%)
None	11	(19.3%)

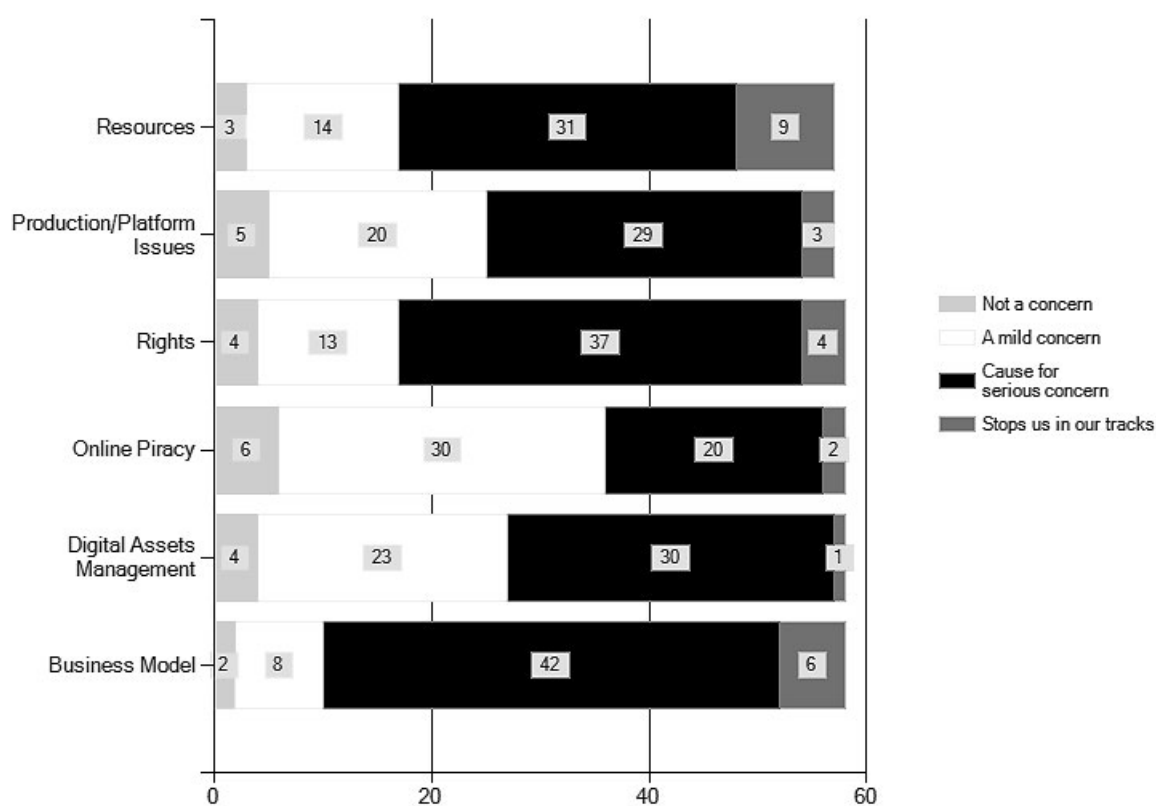
Other (please specify)—12 additional responses reproduced in full below, many constituted explanatory notes to choices selected above:

- Full-text PDFs are available for a select few titles; PDFs of a single chapter are available for most books.
- We currently have one full-text title hosted on our hub site.
- Bibliovault-based Adobe Digital Edition PDFs to go active in November; links to searchable online text in HathiTrust in a few months.
- University of Pittsburgh Press Digital Editions is accessed through our website but is also part of the University Library System’s digital collections and can be accessed through their website as well.
- PDF excerpts coming with release of new website which is scheduled for late Fall 2009.
- Currently, we’re offering free access to PDFs and full, searchable/readable online text to the *Journal of Legal Analysis* only.
- First chapters in PDF and HTML; full search via Google.

- We are currently redesigning our website, which, in its new incarnation, will provide full text search and previews (via Google’s book search widget).
- Link to Google Books, as titles are available in the program.
- We work with our library on open access digital editions.
- Our own electronic presentations are very limited in number and seen as experimental efforts.
- We offer open access to full-text of the titles on IU Press Online, our delivery platform, to the IU community on eight campuses.

6. How great are the following concerns for your press in pursuing digital publishing strategies?

1 press skipped this question



Respondents had the opportunity to comment on this question, and 9 presses left further explanation of their concerns:

- All e-publishing is currently done through vendors who demand a big percentage of sales revenue, and have different metadata requests.
- Digital book publishing is very much a moving target.
- Resource bottlenecks occur at metadata upkeep and binary-file delivery stages, as these are currently manual processes. Our production issues are centered around conversion, which must be outsourced. Rights issues surface primarily over image permissions. Business models are problematic inasmuch as there are currently too many options, rather than too few.

- UPP Digital Editions was funded by library resources; we would not have had the resources to scan 500+ backlist titles on our own.
- The serious concerns (which include most of your points) are currently not stopping us from moving ahead but they have significant impact on how we run our operation now and in the future. We have hired a consultant to help us with some of these issues.
- We use IDG for Digital Asset Management; E-rights to images “stops us in our tracks” for more than 50% of our backlist titles. We are currently conducting an in-depth study of the business models as we transition to a greater percentage of our sales in electronic form.
- Older contracts didn’t make allowance for permissions for digital images, which gives us concern about making some of our books available online. Earlier use of PageMaker and Quark means it is hard for us to go backward in our workflow to make XML documents or even PDFs, so we’ve had to rely on scanning into PDF format by suppliers such as NetLibrary. Some of our older books had high-res images archived by printers, and now these images are unavailable. We are working toward an XML workflow, and there is resistance from our staff to trying a new and radically different process. We are also having trouble getting from “learning” or understanding how to make an XML file to actually creating one (tutorials would be helpful). Most importantly, as we are a small publishing house, there usually are no resources available to scan books, pay for two workflows, allow for digital editions, review contracts with a new digital asset aggregator, or consider the big picture in term of digital publishing and open access.
- Small and midsize presses are at a distinct financial disadvantage in committing to the digital world.
- The fact is that we’re fretting about all aspects of digital publishing. But the appropriate business model is our biggest concern, followed by control of material to reduce potential piracy.

ADDITIONAL NOTES ON CONCERNS

At 48, 41, and 40 respondents respectively, Business Model, Rights, and Resources are considered the greatest concerns in pursuing digital book publishing opportunities.

12 presses responded that one or more of these issues was “not a concern,” and only one of those 12 presses reported that any issue (Rights) was greater than a serious concern.

A press whose survey responses reflect one of the most expansive programs of digital book publishing reported here that they are finding each of these issues to be a serious or greater concern in their efforts.

50% of individuals who report the highest level of concern on at least one issue are directors or publishers by job title.

7. We are incorporating XML into our production workflow to the following extent:

Respondents could choose more than one option. Choices are listed as presented.

4 presses skipped this question.

<u>OPTION</u>	<u># OF PRESSES</u>	<u>%</u>
XML-first workflow	12	(21.8%)
XML output from InDesign or other software	9	(16.4%)
XML output from typesetter/printer	7	(12.7%)
Post-production XML conversion	15	(27.3%)
None of the above	31	(56.4%)

Respondents were invited to comment on this question, and the following 14 statements were submitted:

- Working on XML from Editorial for import into InDesign.
- Again, these are in the testing stage. Our workflow analysis and XML strategy is complete and we're going with DocBook.
- We are currently doing a post-production XML conversion and will be migrating to an XML upfront—likely XML output from InDesign. Post-production XML a quick fix but not a long-term strategy.
- We're working on the first check mark above and have just started doing the second.
- We're looking into implementing XML into our production workflow.
- We will be exploring bringing XML into our workflow this year but no decision has been made. At present, IDG is converting files (where we hold e-rights) to universal PDFs and EPUB.
- We are watching & waiting, primarily for EPUB to stabilize re: page numbers/locators and other apparatus central to scholarly use. We only want to pay for conversions once. Once the specs have been updated, I imagine we'll incorporate XML using multiple approaches, depending on a given title's status in our workflow. We are a long way from XML-first, however.
- We've dabbled but it is so little to be called none of the above. It is something we are planning for moving forward though. Or perhaps to be more precise, EPUB.
- We hope to move to XML output from InDesign shortly. We are seriously discussing XML-first workflow, and hope to experiment with one title from the Spring 2010 or Fall 2010 catalogue.
- We are converting files to XML on a case-by-case basis.
- We are investigating XML workflows and EPUB output as I type this.
- We are only exploring the incorporation of XML workflow at this point. But the leading fronts are to leverage InDesign, or to send material to external vendors for post-production XML conversion.
- We are just starting to try to do the XML conversion ourselves with some of our backlist.
- We convert to XML seldom but as needed. We've decided not to do XML markup initially for financial reasons and because we're not sure how long it will be viable.